

Containing Revolutionary Islam: Reassessing the Problem and the Approach

A Monograph

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Abstract

Containing Revolutionary Islam: Reassessing the Problem and the Approach, by MAJ William A. Ault, Pennsylvania Army National Guard, 53 pages.

The jihadists, represented by the globally minded Al Qaeda, declared war on the West when Osama Bin Laden issued a fatwa in 1998. Their stated strategic aims were first to remove foreign presence from Islamic lands, revolt against the apostate repressive regimes within the Middle East and former Islamic Caliphate territory, and declare a new Islamic Caliphate based on the seventh-century interpretations of Islam and the Prophet Muhammad's life.

Subsequent terrorist attacks did not persuade the United States to abandon its positions in the Middle East, and on one fateful day, 11 September 2001, Al Qaeda brought their transnational rebellion into the forefront of the global stage. After the attacks, the United States increased its presence in the Middle East and began a quest to eradicate the perpetrators of that heinous act.

In the wake of this strategically ill-conceived, yet tactically spectacular event the jihadists went in search for a broader approach to attain their strategic goals. Through numerous documents and writings of strategists and leaders within the jihad community, it has become evident that they have decided on an operational approach based on Mao Tse-Tung's successful protracted war model. The jihadists seek to achieve similar success on a global scale as Mao did within China.

The core of the jihadist threat currently faced by the world is ideologically based, similar in many ways to the threat posed by Soviet communism after World War II. The astute analysis of George Kennan of the virulent and expansionist brand of communism the Soviet Union practiced is an excellent model to frame an assessment of the radical jihadist version of Islam faced today.

Understanding the ideology, strategy, operational approach, and how they attempt to orchestrate actions in time and space are necessary to formulate a comprehensive transnational counter-strategy. Jihadists do not, and have not possessed complete unity in their ranks. The closest they have ever come was immediately following Al Qaeda's spectacular success in 2001. Since then jihadist organizations have been hunted, plagued by in-fighting, and on the run worldwide.

The United States attempt at disaggregation culminating in the Surge in Iraq and death of Osama bin Laden were successful, but the results were not exactly as anticipated. Ideas do not die cleanly, if at all. The resurgence of Al Qaeda, the Taliban and now the breakaway jihadist group ISIS have presented new challenges that require continual assessment and adoption of a sustainable long-term approach to address them successfully. A review of the past provides useful insight into the nature of the current threat and successful methods to addressing ideological threats.

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Acronyms

ADP	Army Doctrine Publication
ADRP	Army Doctrinal Reference Publication
AQ	Al Qaeda
ISIS	Islamic State of Iraq and al-Sham
US	United States
USSR	Union of Soviet Socialist Republics

Introduction

Islam is a revolutionary ideology which seeks to alter the social order of the entire world and rebuild it in conformity with its own tenets and ideals. “Muslims” is the title of that “International Revolutionary Party” organized by Islam to carry out its revolutionary program. “Jihad” refers to the revolutionary struggle and utmost exertion which the Islamic Nation/Party brings into play in order to achieve this objective . . . There is no doubt that all the Prophets of Allah, without exception, were Revolutionary Leaders, and the illustrious Prophet Muhammad was the greatest Revolutionary Leader of all.¹

— Mawlanana Abul a’la Maududi

We have lost our way. In the heat of rage and passion, we struck at our enemies in Afghanistan and Iraq. Once there we entangled ourselves in those areas, and our national sense of moral obligation drove us to endeavor to leave them better than when we arrived. However, the virulent interpretation of Islam that spawned this conflict continues their offensive for the first time since the defeat of the Ottoman Empire during the siege of Vienna in 1683.² This evolving conflict has consumed us for decades, yet we remain challenged in understanding, labeling and addressing the threat adequately.

Violent revolutionary factions of Islam are engaging in conflict with the rest of the world. The evolution of this threat reaches back through the founding of the Muslim Brotherhood to the birth of Islam. The Prophet Muhammad founded and established the theocratic ideology of Islam in the seventh century in blood through the conquest of Mecca, followed by rapid expansion, acquisition of vast territory and subjugation or conversion of populations. The current dominant jihadist organizations seeking similar objectives in arguably the same manner are the rival vanguard movements of Al Qaeda (AQ) and the Islamic State of Iraq and al-Sham (ISIS).

¹ Mawlana Abdul a’la Maududi as quoted in David Aaron, *In Their Own Words: Voices of Jihad--compilation and Commentary* (Santa Monica, CA: RAND Corporation, 2008), 57.

² Robert Cowley, Geoffrey Parker, and editors, *The Readers Companion to Military History* (Boston: Houghton Mifflin Company, 1996), 490-91.

On 23 February 1998, Al Qaeda (AQ) declared war on the West and the current world order when they issued a fatwa calling for jihad.³ Subsequently, Ayman al-Zawahiri published the organization's first strategic document after the attacks of September 11, 2001, declaring the organization an initial vanguard in a revolution.⁴ Al Qaeda, with these events, ushered in what Marc Sageman, Lawrence Wright, Daniel Cox, and other noted authors have labeled as a global jihad.⁵

However, Al Qaeda remains mainly a shadow organization in this conflict, conducting primarily covert operations focused substantially on terrorism and insurgency. Meanwhile, the more recently formed ISIS, breaking away from its affiliation with Al Qaeda, has transformed into a conventional threat occupying a broad swath of territory it designates a Caliphate. This new manifestation of the jihadist threat has received increased pledges of allegiance from other jihadist organizations worldwide and called for individuals around the globe to increase their acts of violence.

This paper suggests that this global conflict is a transnational revolution against the current world order and all opposing belief systems using a Maoist theory of protracted warfare as the operational approach.⁶ The jihadist threat, comprised of diverse groups and organizations

³ Robert O. Marlin, *What Does Al-Qaeda Want? Unedited Communiques* (Berkeley, CA: North Atlantic Books, 2004), 18-21.

⁴ Devin R. Springer, James L. Regens, and David N. Edger, *Islamic Radicalism and Global Jihad* (Washington, DC: Georgetown University Press, 2009), 53-54. Springer states that, "Jihadist groups like al-Qa'ida depict themselves as a righteous vanguard seeking justice and retribution for past wrongs on behalf of Islam. The idea of a revolutionary vanguard – frequently seen in the writings of many jihadist ideologues and Islamists – parallels that called for in Marxist-Leninist literature."

⁵ Marc Sageman, *Understanding Terror Networks* (Philadelphia: PA: University of Pennsylvania Press, 2004), vii, 25, 46; Lawrence Wright, *The Looming Tower: Al-Qaeda and the Road to 9/11* (New York: Knopf, 2006), 127; Daniel G. Cox, "The Struggle Against Global Insurgency," *Joint Forces Quarterly* 56 (2010): 135-139.

⁶ 5. Roger Le Tourneau, Maurice Flory, Rene Duchac, "Revolution in the Mahreb" in *Revolution in the Middle East, and Other Case Studies*, ed. P. J. Vatikiotis (Totowa, N.J.: Rowman and Littlefield, 1972), 81. "Revolution is therefore a deep transformation of the political system, an essential and irreversible change. It is distinct from insurrection, revolt, and rebellion, all of which can lead to a

with a virulent core interpretation of Islamic ideology, seeks to foment a global revolution among Muslims. This ideologically based assault on the world order employs unrestricted warfare methods along the Maoist operational approach in pursuit of their overall strategic goals.⁷ They use propaganda, terror, insurgency, and conventional tactics in various geographic locations to further their cause. Under the umbrella of Islamic religious authority, they seek the overthrow of the western imposed international order.

Additionally, this paper suggests that intervention everywhere this threat emerges is unsustainable for the United States alone, and a transnational complex containment strategy based on a realistic assessment, comparable to that of George Kennan, is a practical framework to consider. Following World War II, Kennan performed an evaluation of the expansionist Soviet communist threat in relation to the United States and the world. Similar to Cold War limitations, the means available and required to achieve overall success will likely require coalitions that take advantage of aggregated elements of transnational power in a synchronized campaign to preserve the global order amidst chaos.⁸

revolution, but are not necessarily one.”; In this paper, the term ‘jihadist’ describes the radicalized, fundamentalist form of political Islamism as practiced by various militant groups. The particular interpretation of Islam that has evolved over time is discussed in the body of the paper. Not all Muslims ascribe to this militant program of revolutionary change.

⁷ Qiao Liang and Wang Xiangsui, *Unrestricted Warfare: China's Master Plan to Destroy America* (Panama City, Panama: Pan American Publishing Company, 2002), xvii-xviii. The term and concept of Unrestricted Warfare has been put forth by Chinese authors Qiao Liang and Wang Xiangsui in a 1999 paper of the same title. “tactics for developing countries...to compensate for their military inferiority vis-à-vis the United States.” They further state “the first rule of unrestricted warfare is that there are no rules, with nothing forbidden.”; Army Doctrinal Publication (ADRP) 3-0, *Operations* (Washington DC: Government Printing Office, 2016), 2-2. “*Operational approach* is a description of the broad actions the force must take to transform current conditions into those desired at end state.”

⁸ George Kennan, “Telegram, George Kennan to George Marshall [‘Long Telegram’]” (George Kennan 8,000 word telegram to US Dept of State detailing views on Soviet Union, Moscow, USSR, February 22, 1946), accessed November 27, 2016, https://www.trumanlibrary.org/whistlestop/study_collections/coldwar/documents/pdf/6-6.pdf.

The following sections offer a synthesis of available literature and concepts relevant to this thesis. Works by many scholars, analysts, and other experts compiled from open source and declassified materials inform this manuscript. The growing body of literature relevant to this conflict continues to evolve with ongoing discovery, analysis, and understanding of our adversary. Importantly, a number of the texts reviewed endeavor to evaluate not only the symptoms but the cause and ideological roots of this conflict.

Ideology heavily informs policy and strategy. Central to this research is the correlation between specific interpretations of the ideologies of Islamism and Communism. These interpretations exhibit a common strategic goal of violent expansion through revolution to dominate the world. The early version of expansionist Soviet Communism profoundly influenced the Maoist approach to revolutionary warfare that has been modified and adopted by the jihadists. Therefore, a significant preparatory point explored in the next section is the concept of the ideological similarities their interpretation and use.

Similarities between Communist and Islamist Ideologies

Michael Freeden notes, “Ideologies are human and social products that bind together views of the world and enable collective action in furthering or impeding the goals of a society.”⁹ Notably, author Meghnad Desai points out that what little distinction between ideology and religion that exists is easily blurred as they are both concepts used to make sense of the world. The danger is how those who wield these concepts misuse them. Regarding the malleability of ideology and religion he emphasizes, “...what was once ideology could easily calcify into

⁹ Michael Freeden, “Ideology and Political Theory,” *Journal of Political Ideologies* 11, no. 1 (February 2006): 14.

religion (as Marxism did) or a religion could be put to ideological uses (as is the case with Global Islamism)."¹⁰

Communist ideology has been a driving force of social upheaval and revolution since its inception. In fact, Karl Marx and Friedrich Engels, the founding fathers of Communism, are two of the most prolific authors concerning ideology.¹¹ They constructed the ideology of Communism based on Marx's interpretation of the world using dialectical materialism. Marx sought to use Hegel's dialectical methods combined with Feuerbach's notion of materialism to describe how the world works. His concept describes human existence as a constant struggle between two groups of people over time.

Using Hegel's dialectal method, Marx broke down the human condition into stages of class struggle.¹² Marx explains that the first-class struggle, occurring during the feudalism period in medieval Europe, was between the feudal lords and the serfs they ruled. This relationship was analogous to slavery where the feudal masters exploited the serfs for agrarian based wealth. The coming of the French Revolution initiated the demise of this system while introducing capitalism. Capitalism was in its early stages when Marx observed and wrote regarding the two classes within which he labeled the bourgeoisie and the proletariat classes.

¹⁰ Meghnad Desai, *Rethinking Islamism: The Ideology of the New Terror* (London: I.B. Tauris, 2007), 59.

¹¹ Karl Marx and Frederick Engels, *Manifesto of the Communist Party* (New York: NY Labor News Company, 1908); Karl Marx and Friedrich Engels, *The German Ideology: Including Theses On Feuerbach and Introduction to the Critique of Political Economy*, Great Books in Philosophy (Amherst, NY: Prometheus Books, 1998), 41-43.

¹² Alfred Adler, K.N. Kornilov et al, *Psychologies of 1930* (Worchester, MA: Clark University Press, 1931), 243-278. Kornilov discusses Marxian psychology and the development of his theory in Marx's book *Das Kapital*. He states, "Thus was created the system, which according to Marx, should not only explain the world, as previous philosophers have done but should also help with its theoretical explanations to change and rebuild it on new and more rational lines." Dialectic materialism regards organic/inorganic nature and human society as mere stages in consecutive development of matter.

The bourgeoisie owned the means of production and exploited the proletariat by forcing them to operate at the lowest wages possible to maximize profit. This inequality, an evolution of slavery, between the rich and poor within the capitalist system could not endure according to Marx. He envisioned a subsequent evolutionary stage of development, socialism. Socialism would put the means of production and control into the hands of the workers or proletariat and substantially flatten the system reducing inequality.

Within Marxist ideology, socialism is a necessary transitional stage leading to communism. The utopian communist phase envisioned would be a classless society in which no state, money or private ownership of the means of production existed, yet an abundance of resources would be present to fulfill all needs. Marx surmised that a transformational process required a revolution to wrest the power and control from the ruling class.¹³ Marx and Engels believed that eventually, communism would usher in a global awakening of the working class to fulfill their vision.

Marx and Engels laid the philosophical foundations of the communist ideology out in *The Communist Manifesto* in 1848. The philosophy was that progression through the stages of evolution to communism would occur naturally, and a spontaneous uprising of the proletariat would eventually happen. In this light, Marx's views were not a blueprint to accelerate revolutionary action because his theory assumed a natural emerging evolution. However, his teachings struck a chord with workers everywhere who sought to hasten the process of socialism to reduce inequalities and better their lives, ultimately leading to violence.

Vladimir Lenin would be the first to harness this concept successfully during the 1917 Russian Revolution. Lenin re-interpreted Marxism into the variation of the ideology commonly referred to as Leninism. Leninism transformed the philosophy and theory of Marx into a

¹³ D. Ross Gandy, *Marx and History: From Primitive Society to the Communist Future* (Austin: University of Texas Press, 2012), 3-5.

prescription for action. Lenin's opportunity to exploit this ideology came at the end of Russian involvement in World War I when the Germans sent him back to a weakened Russia from exile where he provoked a revolution against the Tsarist Empire.

The Leninist interpretation of Marxism eventually gave birth to the Union of Soviet Socialist Republics (USSR) evolving over time into Stalinism. In the wake of this success, interpretations of Marx and Lenin began to take hold elsewhere. Ideological motivation coupled with the innovative operational approach of Mao spread communism to China and Vietnam with Ho Chi Minh. Notably, these cases represent variations of a Maoist approach to implement different interpretations of the Marxist ideology of communism. Using Marxian ideology to mobilize populations, these charismatic leaders bred revolutions to further the goals of overthrowing existing systems and seizing control of several nations during the twentieth century.

Marxist philosophy anticipated an evolutionary path from capitalism through socialism eventually to the ideal state of communism. Revolutionary Marxists used revolution as an accelerant to this process. They sought to take control of an existing state then enforce socialism as a means to the end of a communist state. Interestingly, no state has yet achieved the Marxist communist ideal. After seizing state power, they became state capitalists and never transformed further.

The Soviet Union ultimately failed in this endeavor due changes in leadership, interpretations of ideology and extreme isolationism. China and Vietnam have succeeded in maintaining single-party rule through the implementation of state capitalism and integration to the world economy. However, they are not true communist countries in the Marxist ideological sense. They merely use a form of Socialism to rule politically. It was through the use of communist ideology that the revolutionary power of the population was harnessed to change these societies and their form of governance. Revolutionary power based on the ideological mobilization of disaffected populations provided the ability to seize an existing state and take political control.

Similarly, the jihadists seek to use their interpretation of the ideology of Islam to mobilize Muslims and seize territory (either a full nation-state or parts of multiple states, as with ISIS), implement Sharia law and establish a base of operations for further ideological expansion. They intend to use a re-established Caliphate as the physical and ideological core to support another forceful expansion of Islam in the manner of Muhammad after the seizure of Mecca in the seventh century. However, while the Jihadists share a view of representing an ideological vanguard in the ideological mobilization of the Muslim masses toward these aims, there are internal schisms regarding the interpretation of Islam that have limited the overall effects.

The jihadists principally follow a purist interpretation of the theocratic ideology of Islam. Characterizing the base Islamic ideology and the various interpretations used by jihadists requires extensive research and use of available references. Bernard Lewis, John Esposito, and others have written extensively on the history and ideological evolution of Islam. Islam, as with other ideologies and religions, has undergone numerous interpretations over the centuries. These differing interpretations cause the formation of disparate groups of followers in the form of sects and cults that represent fissures within the ideology.

Islam experienced its first major division after the Prophet Muhammad's death in 632 AD. The divisiveness created the Sunni and Shiite sects of Islam. Scholars and groups within each sect have also differed on interpretations throughout the centuries creating various official and unofficial schools. The Quran, Hadith, Sunna of the Prophet, and the consensus of the community (Sharia Law) are the sources of interpretation by scholars informing these schools.¹⁴

¹⁴ John L. Esposito, *Islam: The Straight Path* (New York: Oxford University Press, 1991), 76-85, 128-132. As new problems and questions arose in the absence of Muhammad a system developed to review law with respect to Quranic teachings. This jurisprudence uses these four sources to develop Sharia Law, which except the core beliefs of Islam is different depending upon which school is followed. The jihadis characterized by Al Qaeda and their adherents today largely follow the Hanbali School and Salafist movement.

The ulama (traditional religious scholars) are primarily responsible for interpretations of these works to generate Islamic Law in a process known as jurisprudence. However, several of unofficial ulama have criticized the various interpretations creating inconsistencies and disagreement within the different schools.¹⁵ Revivalism, or a call for a return to the fundamental components of Islam within the Quran and Sunna, is a central recurrent theme within jihadist interpretations to correct these inconsistencies.¹⁶ This is seen as a purification process. Furthermore, any social system that presents threats of decadence, impiety, repression, deprivation, or corruption is a target for overthrow under the auspices of Islamic revivalism.¹⁷

The most notable revivalist movement for jihadists was the Wahhabi in Saudi Arabia in the mid-eighteenth century. This movement took the purist teachings of Ibn Taymiyya and sought a community life based on rigid interpretation of the Quran and the Hadith.¹⁸ From these roots, the current Salafist movement was born. Contrary to popular belief, the Salafists are not fundamentalists to the exclusion of modernity. Since its inception, Salafism has sought to embrace reason and science bound by purist beliefs in Islam to respond to contemporary challenges. This modernist interpretation of Islam views religion, reason, and science as complementary. Followers of this interpretation seek to incorporate aspects of Western civilization that are not contrary to Islam.¹⁹

¹⁵ Esposito, *Islam*, 45,114; Christopher Melchert, *Studies in Islamic Law and Society*, vol 4, *The Formation of the Sunni Schools of Law: 9th-10th Centuries C.E.* (Leiden: Brill, 1997), xiii-xxviii.

¹⁶ Ali Rahnema, ed., *Pioneers of Islamic Revival, Studies in Islamic Society* (London: Zed Books, 1994), 4; Esposito, *Islam*, 163. Revivalists believe that Islam is a total and comprehensive way of life, religion is integral to politics, law, and society. All failures are because of straying from the path of Islam and to restore God's rule Islamic law must replace all others. Modernization, science, and technology are accepted but not Western society or secularism.

¹⁷ Rahnema, *Pioneers of Islamic Revival*, 5.

¹⁸ Esposito, *Islam*, 117; David Dean Commins, *Library of Modern Middle East Studies*, vol. 50, *The Wahhabi Mission and Saudi Arabia* (London: I.B. Tauris, 2006), 131-139.

¹⁹ Ibid., 125-130, 150-151.

In the shadow of the defeat and dissolution of the Ottoman Empire, Hasan al-Bana established the Muslim Brotherhood in Egypt in 1928 based on Salafist beliefs. Further developing the ideology, the Brotherhood “reinterpreted Islamic history and tradition to respond to the socio-historical conditions of the twentieth century.”²⁰ Sayyid Qutb, often regarded as the father of Islamic radicalism, joined al-Bana in viewing Islam as the all-embracing ideology and vehemently refused secular notions of separating religion from politics or any other aspect of Muslim life.²¹ We find the jihadists of today among this shifting and continual reinterpretation of this strain of the Islamic ideology. Interpretation of Islam over the centuries has and continues to be, malleable, fluid, and indeterminate, which has allowed a great deal of freedom to usurp this ideological language and mobilize individuals to their cause.²²

As Freedon indicates, ideologies are pliable and shift demonstrating perpetual mutation among various viewpoints over time.²³ The preceding paragraphs suggest this ideological pliability within the variations in Communism and Islam. The form of Communism first laid down by Marx and Engels, adopted by Lenin and then adjusted by Stalin and his predecessors differs from that of Mao in China or Ho Chi Minh in Vietnam. Similarly, various cultures, regions, and groups around the world have adopted variant interpretations of Islam. Due to these diverse ideological interpretations, it is difficult to categorize communists or Islamists into monolithic groups. This aspect continues to be a significant challenge to their ability to ignite the fire of revolution within the greater Muslim population.

²⁰ Esposito, *Islam*, 149 - 150. Jihadists are a group of true believers that are totally committed to the struggle (jihad) to transform society. They see themselves as a vanguard within a populist movement to foment an Islamic revolution. Their ideological outlook is modeled on the Prophet Muhammed and his first Islamic religiosocial reformation or revolution.

²¹ Ibid., 148-150.

²² Freedon, 12.

²³ Ibid.

The jihadist adheres to a particular interpretation of their ideology that is apparently not widely accepted by the majority of the Muslim population. However, they continue to attempt to mobilize the masses to their revivalist version and revolt against the global order. A common theme within the interpretation of Islam and that of Marxist communism is the eventual domination of the ideology as the one true and correct guiding ideology for all humanity.²⁴

The analogy set forth here between communism and Islamism does not seek a value judgment of either of these concepts, only to set forth the basis of a long-term existential struggle as viewed by each of these contending ideologies. In each instance, followers of these ideologies have a fundamental choice presented to them. One seeks alteration through integration and more peaceful methods the other to transform the world more violently. They may choose evolution or revolution.

Evolutionary change occurs when groups seek to change the system from within when confronted with differing interpretations or perceptions. Communists, Socialists, and Muslims have formed political groups inside nations seeking evolutionary change by participatory activities in the structure of their societies. Socialist parties in democratic nations have attempted to bring about social reforms within countries by winning the vote and thereby government power. Islamic groups such as the Muslim Brotherhood, primarily a socio-political movement, seek change in the same manner.

²⁴ Esposito, *Islam*, 71; Jan-Erik Lane, “Rise of Radical Islamic Fundamentalism: Mawdudi, Qutb and Faraj,” *The Journal of Social Sciences Research* 2, no. 2 (2016): 34-43; Mark A. Gabriel, *Islam and Terrorism* (Lake Mary: Frontline, 2015), 78. Gabriel Quotes Mawlana Abul Ala Mawdudi, the founder of Pakistani fundamentalist movement, “Islam is a revolutionary faith that comes to destroy any government made by man. Islam doesn’t look for a nation to be in a better condition than another nation. Islam doesn’t care about the land or who owns the land. The goal of Islam is to rule the entire world and submit all of mankind to the faith of Islam. Any nation or power that gets in the way of that goal, Islam will fight and destroy. In order to fulfill that goal, Islam can use every power available every way it can be used to bring worldwide revolution. This is Jihad.”

The Muslim Brotherhood has been attempting evolutionary change within Egypt since their inception in 1928, finally coming to power after the 2011 Arab Spring. Egyptians however, rejected their attempts to bring about rapid change along stricter interpretations of Islam, forcing them out of power in short order. These types of evolutionary changes are contentious and laborious. Minority ideological views inside a national society rarely gain the traction necessary to make sweeping changes from within an existing system.²⁵

More notable are the revolutionaries of the world such as Muhammad, Lenin, Mao, and Ho Chi Minh. These figures and their ideologically motivated supporters sought seizure of the state to transform it to align better with their worldviews. Two frameworks are presented to assist in the exploration of the characteristics and linkages of ideological revolution represented in the case studies. Stephen Walt identifies characteristics common to revolutions in his book *Revolution and War* and Mao himself demonstrates the development and application of his theory of protracted war to execute the Chinese revolution.

The frameworks and case studies show the historical precedent and impact of Muhammad, Mao, and Giap on the jihadists' revolutionary movement of today. Exploration of Giap's adaptation of the Maoist model to prosecute the successful conflict in Vietnam and Muhammad's apparent use of Maoist principles, well before being codified by Mao, in his campaign against Mecca, clearly demonstrate similarities to the jihadists current approach. Apparently, their revolutionary ideological interpretation of Islam stems from the inspirational life and actions of Muhammad in the seventh century and the creation of Islam blended with the operational approach of Mao theory of protracted war.

²⁵ Francesco Cavatorta and Fabio Merone, "Post-Islamism, Ideological Evolution and 'la Tunisianite' of the Tunisian Islamist Party Al-Nahda," *Journal of Political Ideologies* 20, no. 1 (17 Apr 2015): 27-42; Carrie Rosefsky Wickham, *The Muslim Brotherhood: Evolution of an Islamist Movement* (Princeton: Princeton University Press, 2015), 1-8.

Revolution

As with ideology, revolution is a topic with a considerable volume of literature. As indicated in the introduction, it is evident the jihadists seek to remake the world order based on their interpretation of Islam. This transformation is revolutionary and not evolutionary in nature. As a reference point, Mao describes revolutions in *On Guerrilla Warfare* as:

...never confined within the bounds of military action. Because its purpose is to destroy an existing society and its institutions and to replace them with a completely new structure, any revolutionary war is a unity of which the constituent parts, in varying importance, are military, political, economic, social, and psychological.²⁶

Stephen Walt's book *Revolution and War*, adds to this description of revolution:

A revolution is more than just a rearrangement of the administrative apparatus or the replacement of one set of rulers by other members of the old elite. Instead, a revolution creates a fundamentally new state based on different values, myths, social classes, political institutions, and conceptions of the political community. ... a revolution establishes the basic nature of a polity.²⁷

The revolutionary jihadists' do not seek normal control of an existing state or government as with their ideological evolutionary brethren. They endeavor to destroy existing secular governments and replace them with a Sharia-based transnational entity based on their revivalist interpretation of Islam. They view Islam as a comprehensive religious, political, and social system.²⁸

²⁶ Mao Tse-tung. *Mao Tse-Tung: On Guerrilla Warfare*, trans. Brig Gen Samuel B. Griffith (1937, Washington, DC: United States Marine Corps, 1989), 7, accessed November 26, 2016, <http://www.marines.mil/Portals/59/Publications/FMFRP%2012-18%20Mao%20Tse-tung%20on%20Guerrilla%20Warfare.pdf>.

²⁷ Stephen M. Walt, *Revolution and War* (Ithaca, NY: Cornell University Press, 1997), 12.

²⁸ Esposito, *Islam*, 35; David Bukay, *From Muhammad to Bin Laden: Religious and Ideological Sources of the Homicide Bombers Phenomenon* (New Brunswick, N.J.: Transaction Publishers, 2008), 185, 211. Al-Mawdudi is quoted as stating, "Jihad is an active holy war to eliminate un-Islamic systems, to establish Islamic state rule, and to bring about a universal revolution."

The revolutionary characteristics of the jihadists' movements are evident when compared to the five common features that revolutions exhibit according to Walt.²⁹ Initially, internal and external challenges that weaken state administrative and coercive capacities permit revolutions to flourish. Review of key international and intra-national events indicate they have created permissive conditions favorable for jihad to develop and thrive in various geographic locations over the past several decades. Several pivotal events illustrate this first condition.

The end of the Ottoman Empire and enactment of the Sykes-Picot agreement at the end of the 1920s broke the empire, the last Islamic Caliphate, into secular nations under western influence. These actions were directly responsible for spawning the Muslim Brotherhood in 1928, arguably the first jihadist group seeking the reestablishment of the dissolved Caliphate.³⁰ Another pivotal event was the Soviet invasion of Afghanistan in 1979, which energized jihadist fervor and planted the seeds for future globalized efforts.³¹ Likewise, other external and internal events meshed with the end of the Cold War to dramatically weaken many of the repressive secular regimes that had kept jihadists groups in check.

Globalization and social changes ushered in a diffusion of power and permitted Muslim communities and jihadists within these states to expand activities, further weakening the state's ability to control narratives and information.³² One example is the explosion of social media

²⁹ Walt, *Revolution and War*, 20.

³⁰ William McCants, *The ISIS Apocalypse: The History, Strategy, and Doomsday Vision of the Islamic State* (New York: Picador, 2016), 122. The Caliphate and office of the Caliph 'still carried tremendous symbolic import among Sunnis...the loss of the caliphate after World War I represented the end of Muslim political power and the triumph of the West.'

³¹ Douglas Lovelace, Kristen Boon, and Aziz Huq, *Terrorism: Commentary On Security Documents Volume 123: Global Stability and U.S. National Security* (New York: Oxford University Press, 2012), 59-61.

³² David S. Sorenson, *An Introduction to the Modern Middle East: History, Religion, Political Economy, Politics*, 2 ed. (Boulder: Westview Press, 2013), 256; Erik A. Claessen, *Stalemate: An Anatomy of Conflicts between Democracies, Islamists, and Muslim Autocrats* (Santa Barbara, CA: Praeger, 2010), 54-75.

capabilities enabling the Arab Spring movement, igniting rebellions in various Middle Eastern nations known for formerly repressive regimes. Of course, the United States invasion of Afghanistan and Iraq, followed by the subsequent withdrawal from Iraq, changed the political structure and stability of those countries and the greater region immensely. All of these combined to create a situation ripe for exploitation.

The second feature Walt discusses an explosion of political activity. He characterizes these actions as being primarily illegal “because the institutions and principles of the old regime offer no legitimate outlet for them.”³³ Examples of this abound in the Middle East. Regimes were able to repress many of the subversive and overt activities of the jihadists until external support began to wane after the Cold War. With state power eroding, many traditional Islamic cultures use of globalization tools such as social media and cell phones to mobilize and demonstrate against their regimes began to increase. As mentioned, the Arab Spring phenomenon took advantage of weakened centralized control. This watershed event further destabilized governments and sparked rebellions in Egypt, Libya, and Syria, as well as protests in other nations. These increased opportunities for the jihadists to exploit within each of those regions.

A comment by Elfatih Abdel Salam on destabilization in Syria is indicative of the exploitative nature of the events:

The country is being torn apart by two wars: rebel militias that emerged from the 2011 uprisings are fighting the government of Bashar al-Assad, and the Islamic State (IS) extremists who are carving up territory, largely from the rebels, but also from the governments in both Syria and Iraq.³⁴

These situations, eruptions of social unrest against the current system, are the very ones that ideological revolutionaries seek to encourage and capitalize on to present their alternative

³³ Walt, *Revolution and War*, 20.

³⁴ Abdel Salam, Elfatih A., "The Arab spring: Its origins, evolution and consequences... four years on," *Intellectual Discourse* 23, no. 1 (2015): 119-139.

solution and gain the support of the masses. As Douglass North stated, “the objective of a successful counter-ideology is to convince people that the observed injustices are an inherent part of the system but also that a just system can come about only by active participation of individuals in the system.”³⁵ Although initially slow to take advantage of these upheavals, jihadists eventually capitalized on the groundswell.

Walt’s third feature of a revolution is that they “alter the language of political discourse and foster the development of new symbols and social customs.”³⁶ He further explains that this usually takes the form of flags, anthems, and social practices. Jihadists’ actions have emulated this from their inception. All groups have a separate and distinct flag, slogans, and symbols. The commonality among them all is the adherence to the purist interpretation of Islam and jihad. These revivalist tenets of Islam are symbols in and of themselves.

John Esposito and Jonathan Matusitz emphasize the “powerful symbolism and revolutionary meaning of jihad.”³⁷ Adherents’ requirements for Sharia Law, traditional dress, and repression of western culture in all territory they control are a representation of compelling social customs. Imposition of a traditionalist interpretation of an Islamic way of life that permeates all aspect of politics and existence is a clear indicator of their attempt to alter political and social characteristics of the areas they control. Most important is the symbolism of the strategic goal of establishing the Caliphate and imposition of Sharia within Islam.

³⁵ Douglass C. North, *Structure and Change in Economic History* (New York: W. W. Norton & Company, 1982), 53-54.

³⁶ Walt, *Revolution and War*, 20.

³⁷ Jonathan Matusitz, *Symbolism in Terrorism: Motivation, Communication, and Behavior* (London: Rowman & Littlefield Publishers, 2014), 139, 165-181, 257-273; John L. Esposito, *Unholy War: Terror in the Name of Islam* (New York: Oxford University Press, 2003), 6, 116, 157; Department of Social Sciences, US Military Academy Combating Terrorism Center, *The Islamic Imagery Project - Visual Motifs in Jihadi Internet Propaganda* (West Point: Combating Terrorism Center, US Military Academy, 2006).

The fourth feature Walt puts forth common to revolutions is an alteration to the principles of leader selections. He indicates that leader selection normally is from previously barred groups and this leads to an inevitable redefinition of the political community.³⁸ Again, this is evident in various activities of the jihadists as well. Seventh-century practices within Islam inform leader selection within these groups. In locations, such as Afghanistan with the Taliban, and most notably the new Islamic State, leadership came to power by force and self-proclaimed divine providence or linkage with the Prophet.

Muhammad failed to establish guidance for succession before his death. This omission led to a reversion to the use of a tribal selection council. However, this council formed from the new Muslim umma leaders who were of mixed tribes and not traditional clans. Therefore, the councils were rife with internal dissensions and rivalries as they chose successors, the first Caliphs. Contemporary confirmation of this contentious process was evident in the delay in the selection of Ayman al-Zawahiri after the death of Osama bin Laden.³⁹

More recently, jihadist groups, like ISIS, have returned the adherence of traditional principles of leader selection in territories they control as is evidenced by the nomination of Abu Bakr al-Baghdadi. His education in Islamic studies and professed linkage as a descendant of Muhammad himself added credence to his selection as leader of the Islamic State by an eleven-member Shura Council.⁴⁰ Also of note, there is a long history of disputed religious and

³⁸ Walt, *Revolution and War*, 20.

³⁹ Rob Crilly, “Ayman al-Zawahiri new al-Qaeda head: how does succession work?,” *Telegraph*, 16 June 2011, accessed January 11, 2017, <http://www.telegraph.co.uk/news/worldnews/al-qaeda/8579487/Ayman-al-Zawahiri-new-al-Qaeda-head-how-does-succession-work.html>.

⁴⁰ McCants, *The ISIS Apocalypse*, 73-79.

political/military leadership selection criteria for the Muslim community (umma) between Sunnis and Shias.⁴¹

The fifth and final feature discussed by Walt is the aspect of violence. He indicates, “...force is often needed in order to oust the old regime.”⁴² More than any other feature, violence is a characteristic indicative of the current jihadist threat and their selection of a revolutionary path.⁴³ Multiple examples of terror attacks, guerrilla or insurgent activities and conventional actions of groups abound. The latest violence that has created the Islamic State out of portions of Iraq and Syria is a culminating event for jihadists from a violence perspective.

Sayyid Qutb, a key figure in jihadist evolution discussed later, was instrumental to the shift in thinking of jihad as an offensive vanguard with the task of “purifying the filthy marsh of the world” through armed struggle and acts of martyrdom.⁴⁴ Co-founder of Al Qaeda with Osama bin Laden, Abdullah Azzam, made statements such as, “Jihad and the rifle alone. NO negotiations, NO conferences, and NO dialogue,” and “History does not write its lines except with blood. Glory does not build its lofty edifices except with skulls,” to mention but a few lines

⁴¹ Carsten Anckar, *Religion and Democracy: A Worldwide Comparison* (New York: Routledge, 2013), 51-61; Cameron Glenn and Garrett Nada, “*Rival Islamic Leaders: Isis v Iran*,” The Wilson Center: Woodrow Wilson International Center for Scholars, February 10, 2015, accessed December 1, 2016, <https://www.wilsoncenter.org/article/rival-islamic-leaders-isis-v-iran>.

⁴² Walt, *Revolution and War*, 20.

⁴³ Sam Mullins, “The Road to Orlando: Jihadist-Inspired Violence in the West, 2012-2016,” *Combating Terrorism Center at West Point CTCSENTINEL*, June 2016, 26-30, accessed December 1, 2016, https://www.ctc.usma.edu/v2/wp-content/uploads/2016/06/CTC-SENTINEL_Vol9Iss612.pdf; Peter Neumann, “Jihadist Violence: The Devastating Cost,” *BBC News Services*, December 11, 2014, accessed December 1, 2016, <http://www.bbc.com/news/world-middle-east-30391588>; “Jihadism: Tracking a Month of Deadly Attacks,” *BBC News Service*, December 11, 2014, accessed December 1, 2016, <http://www.bbc.com/news/world-30080914>.

⁴⁴ 10. Michael Watts, “Revolutionary Islam: A Geography of Modern Terror,” in *Violent Geographies: Fear, Terror, and Political Violence*, ed. Derek Gregory and Allan Pred (New York: Routledge, 2007), 186.

of his violent rhetoric regarding jihad.⁴⁵ The jihadist interpretation was seeded, gestated and thrives on violence. Jihadists agree that violence is the only acceptable method to accomplish their objectives even though the various factions continue to debate its precise use and timing.

Ends, Ways, and Means⁴⁶

The jihadists are not keeping their intent and designs secret. Prominent figures within the jihadist community have written profusely on strategic ends, operational methods, and tactical means to accomplish their aims throughout the years. Michael W.S. Ryan details the prolific historical figures such as Ibn Taymiyyah, Abd al-Wahaab, Sayyid Qutb, and Syed Abdul A'ala Maududi as prominent jihadists' thinkers. He further discusses the strategists and operational minds behind doctrinal development like al-Zawahiri, al-Qurashi, al-Muqrin, al-Suri, and Abu Bakr Naji. He also goes into considerable detail on their contributions to the evolution of jihadist thought and doctrine.

Exploration of these writings reaffirms the jihadists' worldview and strategic aim as one requiring a return to purist Islamic interpretations. Their identified strategic goal (ends) are the removal of Western influence from Muslim lands, the overthrow of apostate rulers in these lands, and the establishment of a Caliphate as a base for further expansion and eventual dominance of Islam worldwide.⁴⁷ The operational approach (ways) established by Abu Bakr Naji in *The Administration of Savagery* is refined further by Abu Ubayd al-Quarashi, Abd al-Aziz al-Murqrin

⁴⁵ Charles Lindholm and José Pedro Zúquete, *The Struggle for the World: Liberation Movements for the 21st Century* (Stanford, CA: Stanford University Press, 2010), 123; Abdullah Azzam, *The Lofty Mountain* (London: Azzam Publications, n.d.), 12, accessed February 20, 2017, <https://ebooks.worldofislam.info/ebooks/Jihad/The%20Lofty%20Mountain.pdf>.

⁴⁶ This paper defines ends as the strategic or policy aim, ways as the operational approach taken to achieve those policy aims and the means are the tactical methods used.

⁴⁷ Lorry M. Fenner, Mark Stout, and Jessica L. Goldings, eds., *Ten Years Later: Insights On Al-Qaeda's Past and Future through Captured Records* (Washington, DC: The Johns Hopkins University Center for Advanced Governmental Studies, 2012), 51.

and Abu Mus'ab al-Suri in their writings.⁴⁸ The approach is flexible, resilient, and based largely on American and European traditions of military strategy and doctrine that tie closely to Mao Tse-Tung's theories and concepts on guerrilla warfare.⁴⁹

Ryan's analysis is illustrative of the larger views jihadists have of the protracted war, and the role tactics such as insurgency, terrorism, and propaganda play in the larger revolution. Jihadists have studied the iconic theorists and practitioners of proven, successful methods of revolution and married their ideology with Maoist strategies for their approach to protracted revolutionary war.⁵⁰ Others concur with Ryan in their assessment regarding jihadist revolutionary aims. Retired Lieutenant General James Dubik, referencing Clausewitz in an article, stated that if we used the Prussian theorist correctly “we would be clear that our enemies are waging a global, revolutionary war.”⁵¹ The interpretation of Islamic ideology has always been there as a guide to their worldview and provides the same message to the jihadists that it did in the seventh century. Islam has always been revolutionary, and its strategic goal is simple, to rule the world as the one true way of life for all humanity, not merely a non-politicized religion in the western sense.

The means the jihadists have overwhelmingly gravitated towards in pursuit of their objectives are terrorism and insurgency. These are tactics of the weaker side as Mao discussed in the first phase of his protracted war theory. The Maoist theory of protracted war, widely accepted by all jihadist groups on a global scale, necessitates the use of these tactics until conditions

⁴⁸ Michael W S. Ryan, *Decoding Al-Qaeda's Strategy: The Deep Battle Against America* (New York: Columbia University Press, 2013), 12. Ubayd al-Qurashi was a prolific writer concerning military strategy. He penned numerous articles for online magazines and journals (*Al Ansar*, *Saber Training Camp*, *The Voice of Jihad et al.*). He penned an article titled *Revolutionary Wars* where he defined revolution as a “comprehensive and fundamental change in political organization, social structure, economic property, and the existing social conditions.”

⁴⁹ Ryan, *Decoding Al-Qaeda's Strategy*, 12, 86-87, 94, 130, 271.

⁵⁰ Ibid., 83-146.

⁵¹ James Dubik, “By any other name, war is still war,” *Army Magazine*, June 2016, 17.

become favorable to transition to other means. Some analysts have correctly recognized the tactics of terrorism and insurgent warfare used in the current conflict as means to achieve their ends, not ends in and of themselves. This paper seeks to expand the analysis and correctly categorize these tactics within the overall approach used by the jihadists in pursuit of a transnational revolution by jihad.⁵² Thereby adhering to Clausewitz in correctly identifying the type of conflict which we are engaged.⁵³

As indicated in the introduction, the various labels used over the years to characterize this conflict show the difficulty in determining the real threat. At first, it was a War on Terror, then a series of changes from a Long War, a global insurgency, and most recently as a global jihad. Many books and papers explain and describe the use of the tactics of terrorism and insurgency over the course of this conflict. The view taken here is that these merely constitute the tactical methods (means) used to wage this revolution. Their application geographically is a matter of conditions and selection within the greater Maoist approach. As Ryan's analysis of jihadist published materials indicates, they are avid students of western military doctrine and theory and fully understand the principles and tenets of warfare.

Robert Taber is one strategist mentioned by name in jihadist writing that concludes all guerrilla war is revolutionary war.⁵⁴ As stated, the operational approach used to orchestrate jihadist actions is a Maoist model for protracted war. This model succeeded once tailored to the

⁵² John Mackinlay, *The Insurgent Archipelago: From Mao to Bin Laden* (New York: Columbia University Press, 2009), 15-26. Mackinlay discusses the evolution of Maoist insurgency to a global form modeled after "Mao's recognition of the population as the primary asset of a modern landscape..., and his concept for mobilizing a population through the simultaneous processes of subversion, politicization and an irresistible ideology marked the point in the narrative where the antecedents of global insurgency become apparent."

⁵³ Carl von Clausewitz, *On War*, trans. Michael Howard and Peter Paret (Princeton, NJ: Princeton University Press, 1984), 88. "The first, the supreme, the most far-reaching act of judgment that the statesman and commander have to make is to establish by that test the kind of war on which they are embarking; neither mistaking it for, nor trying to turn it into, something that is alien to its nature."

⁵⁴ Ryan, 85.

individual conditions, situation, and context within each of the case studies examined herein. The underlying theories of Mao's three phase protracted war succeeded in China, Vietnam, and Mecca in the seventh century to establish Islam.

Mao Tse-Tung and Protracted Revolutionary Warfare

Stuart Schram has written several books on Mao that assisted greatly in the analysis of the evolution of his thoughts. *The Political Thought of Mao Tse-Tung* and *The Thought of Mao Tse-Tung* explore the development of Mao's concepts and writings on ideology and protracted warfare to achieve political aims. As Schram indicates, Mao fully embraced the Marxist-Leninist ideology after his exposure to it.⁵⁵ It is also evident that Mao held the conviction that China was only a part of a larger world communist revolutionary movement fueled by this ideology, similar to jihadist convictions today.⁵⁶

With this ideological underpinning, the Chinese communists undertook a zealous campaign of confrontation with the much stronger Nationalist Chinese forces. They sought to ignite the masses into a revolution as occurred during the Russian Revolution of 1917. This hope evaporated as the communists suffered crushing urban defeats between 1927 and 1934 that almost destroyed them. Subsequently, they undertook the infamous Long March to the far north in the autumn of 1935 to escape and regroup.⁵⁷ After winning an internal struggle for leadership, Mao set out to rebuild the party and his forces along with a new doctrine.

⁵⁵ Stuart R. Schram, *The Political Thought of Mao Tse-Tung* (New York: Praeger, 1971), 35; J. Kelley Sowards, ed., *Makers of World History*, 2nd ed., vol. 1 (New York: St Martins Press, 1995), 245. Mao was exposed to Marxist-Leninist ideology during his time as a student at Peking University and served as one of the founders of the Chinese Communist Party in 1921.

⁵⁶ Stuart Schram, *The Thought of Mao Tse-Tung* (Cambridge: Cambridge University Press, 1989), 51.

⁵⁷ Stephen Uhally, *Mao Tse-Tung: A Critical Biography* (New York: New Viewpoints, 1975), 48-49. The Communists escaped destruction through an incredible march of six-thousand miles over 370 days to the remote northwest region of China. Beginning in October 1934 and ending in October 1935. The Communists lost an estimated fifty-thousand or half of their overall strength in the process.

The time spent in North China represents the gestation period of Mao's interpretation of Marxist-Leninist dogma and his theory of protracted war. After considerable study and thought as it pertained to the Chinese situation, Mao rejected the traditional Leninist model of mobilizing the urban proletariat. He recognized the fallacy of transposing the Russian model of revolution onto China with its vastly different demographics and conditions. He understood China and envisioned extensive preparation and mobilization among the poor peasant population before transitioning to armed struggle. During the communist's period of exile to escape the Nationalists, Japan invaded Northern China in July of 1937.

It was during this conflict that Mao developed the three-phase approach discussed in *On Protracted War*.⁵⁸ This method is an essential preparatory formula for a peasant-based geographically dispersed revolutionary conflict. Central to Mao's approach is the symbiosis of military and political goals. In deference to Clausewitz, Mao believed that a clear politically driven strategic goal was necessary to synchronize all military activities and provide unity of effort to the numerous disparate groups that made up the movement. Furthermore, Mao understood the transition between phases to be conditions-based and dependent upon the relation of capabilities between the guerrilla and the adversary.

An overarching concept for the three phases is to exhaust the enemy while building one's strength. Mao was always searching for the position of relative advantage politically, strategically, operationally, and tactically. As cited in the previous paragraph to understand Mao's approach the reader must view it as a whole integrated approach. Each phase has political, strategic, operational, and tactical aspects within it.

⁵⁸ Mao Tse-Tung, *Selected Works of Mao Tse-Tung: Volume II* (Peking: Foreign Language Press, 1965), 136-145. Mao describes the three phases and expectations in detail. The five volumes of *Selected Works of Mao Tse-Tung* were extremely helpful in researching Maoism and the concept of protracted war for this study.

The first phase is a strategic defensive posture for the revolutionary to counter the strategic offensive by the adversary. During this phase, limited military action's primary purpose is to gain the support of the local population and to train new cadres while building confidence. Any method to gain the willing or coerced support of the population while allowing the enemy to overextend in search of guerrilla formations is acceptable.⁵⁹

Phase two or the strategic stalemate was a period characterized by the culmination of the adversaries' ability to expand operations requiring the adoption of a strategic defensive posture. During this time, there would be an increase in guerrilla activities against the enemy. Again, it is worth noting that the overall intent of Mao's strategy is exhaustion. Using tenets of unrestricted warfare, guerrillas would strike where opportunities were in their favor in whatever manner possible to continue exhausting the adversary. Phase two was the most critical to success in Mao's view.⁶⁰ Once the enemy was sufficiently exhausted and conventional, unconventional, and logistical strength considered sufficiently superior would transition to phase three be possible.

Transition to a strategic counter-offensive against the overextended adversary marked phase three. Support of the masses and a sufficiently exhausted and demoralized opponent faced with an overmatch in morale and physical capabilities were critical conditions for success during this phase. Mao expected that phase three should be of short duration due to the superiority gained over time. However, the ability to transition between and apply the different phases across diverse regions of the vast Chinese territory solely based on local conditions between the two belligerents created a very elastic theory.⁶¹

⁵⁹ Tse-Tung, *Selected Works of Mao Tse-Tung*, 136-138, 141.

⁶⁰ Ibid., 138-140, 142. Mao stated, "The second stage will be the transitional stage of the entire war. It will be the most trying period but also the pivotal one."

⁶¹ Ibid., 140, 143, 145-148. Mao discusses Jominian concepts of interior and exterior lines as well as the ebb and flow of territorial possession and back and forth nature of the conflict with Japan. He also touches on various aspects of popular support and international perceptions of the conflict.

Mao's flexibility in the orchestration and application of the means available to the communists towards their clearly identified strategic objective is a fundamental component of his theory. He recognized the constant transformation of the character of war that accompanied the dynamic and ever developing situations the communists faced. Ultimately, "the core of Mao's theory is built upon the basis of mobilizing, organizing, arming, and fighting with the whole people of the society."⁶² In his writings, he stressed that the struggle would be a protracted war, ruthless in nature and that the Chinese had to understand a hard road lay ahead of them.⁶³

There was no shortcut to Mao's method of ensuring success. The first phase of the theory of revolution, the strategic defense, required long-term interaction and hard work with the population. The cultivation activities in this phase seek to ensure guerrilla survival and establish favorable conditions for the future. Mao placed less emphasis on military action during this phase and more emphasis on indoctrination of the population in their ideological foundations.

The first phase sought to establish infrastructure and bases in rural areas to support future operations. Phase one activities also demonstrate the explosion of political activities discussed by Walt aiming to gain and maintain popular ideological support from the masses. In the Maoist model, leveraging unrest and discontent among the mass population to forge a larger coalition in support of the revolutionary ideology is a critical element for revolutions.

The Chinese communists organized and established popular support while conducting information and political campaigns through extensive propaganda. Limited guerrilla operations executed during this phase assisted in training new guerrilla formations and keeping the Nationalists off-balance. This extensive preparation phase was a requirement to set conditions for

⁶² Chen-Ya Tien, *Chinese Military Theory: Ancient and Modern* (Oakville: Mosaic Press, 1992), 223.

⁶³ Tse-Tung, *Selected Works of Mao Tse-Tung*, 140.

ultimate success in Mao's eyes and should take as long as necessary to build the proper foundation before proceeding further.

The presence of an external enemy, after the Japanese invaded, exacerbated Walt's characteristic of a weak central government. These conditions made convincing the masses that the active or passive support of the guerrilla best served their fortunes much easier. Establishing control of rural areas vacated after Japanese confrontations with Nationalist troops created a hospitable environment for the guerrillas and a hostile one for the enemy. The communists used various tactics, including terrorism, to convince the peasants that at least passive support was advisable. Establishment of the sea in which his guerrilla fish could swim and hide was necessary to move into the next phase of the conflict.⁶⁴

In this respect, a fundamental characteristic of the Chinese Revolution was the exercise of control over the countryside and the residents before ever attempting to seize centralized power. This placed the Chinese Communists in the position of being:

A revolutionary army, seeking to draw from the 'ocean' of the masses the sustenance necessary to the conduct of its operations; that of the 'vanguard party', seeking to guide the proletariat in the accomplishment of its historical mission; and that of government, or state within a state, in which capacity it established with the population under its control a complex network of interactions on many levels.⁶⁵

Greatly assisting this aspect was a communist expansion of secure base areas and territorial control which increased dramatically during the period of the Japanese occupation. Japanese estimates in 1939 indicated a communist force of approximately 800,000 controlling about 130 counties. By 1944, they had established more than sixteen revolutionary base areas controlling all

⁶⁴ Tse-tung, *Selected Works of Mao Tse-Tung*, 136-38; Peter G. Macdonald, *Giáp: The Victor in Vietnam* (New York: W.W. Norton, 1993), 62. Mao states, "A neutral population is slowly convinced by a combination of selective terrorism, intimidation, persuasion, and massive agitation. Leadership is never more important than in the first stages."

⁶⁵ Schram, *The Thought of Mao Tse-Tung*, 45.

or part of 635 counties with an increase in overall strength to about one million men.⁶⁶ They accomplished this by moving into areas in the wake of Japanese offensives against the Nationalists and increasing political activities.

Mao encouraged democratic elections and broad participation in political processes during this period which made the Communists much more attractive than the repressive Nationalists.⁶⁷ This increased popular support among the population was the primary purpose of the strategic defensive in phase one operations. As Mao stated, "...it is impossible to sustain guerrilla war...without base areas."⁶⁸ These base areas were safe areas for the guerrilla to plan, train, equip and otherwise sustain themselves to extend their operational reach. The secure base areas and sufficient control and support of the population set conditions to proceed into the second phase of protracted war, that of strategic equilibrium.

The second phase of operations, strategic stalemate or equilibrium, allowed an increase in overall military activities such as guerrilla warfare. This transitional phase would be the most difficult according to Mao.⁶⁹ Limited control of geographic areas would allow the guerrillas to establish shadow governments and secure areas to begin recruiting and training regular forces for phase three operations. Guerrilla raids and activities would demoralize and weaken opposing forces while bolstering confidence and gaining materiel and weapons for the guerrillas. Mao anticipated that the Japanese and later the Chinese Nationalists would seek to expand their control through garrisons over the vastness of China. These actions would stretch finite forces thin

⁶⁶ James Pinckney Harrison, *The Long March to Power: A History of the Chinese Communist Party, 1921-1972*. (New York: Praeger, 1972), 296-297.

⁶⁷ Uhalley, *Mao Tse-Tung*, 64-65.

⁶⁸ Tse-Tung, *Selected Works*, 93.

⁶⁹ Ibid., 139-140. Mao indicates phase two operations will have many hardships and last a comparatively long time and it will be the most trying and pivotal period.

creating a condition of weakness everywhere to exploit with concentrations of strength against isolated garrisons. A primary goal of this phase was to expand control of the countryside, continue training and building conventional strength, and increase active support of the population in rising and joining the cause.⁷⁰

During this second phase of operations, the balance shifted toward the Chinese Communists as they continued to execute operations. The Japanese and the nationalists were doing much of the conventional fighting, and as such, they grew increasingly exhausted until the precipitous collapse of Japanese resistance brought about by the end of World War II. The communists were quick to capitalize on this event and received the surrender, weapons, and equipment from many Japanese units while also seizing control of the territory they once held. These actions allowed for a rapid expansion of phase two operations against the already weakened nationalists as the internal Chinese revolution continued.

Phase three operations began once the balance shifted in the Communists favor and conditions were favorable. The third phase of Mao's model, the strategic offensive, permitted communist forces to execute compound warfare to seize the initiative and defeat their opponents. This culminating phase should be shorter than the previous two while retaining political, propaganda and guerrilla activities. This phase would rely much more heavily on conventional forces to decisively defeat and seize government institutions.⁷¹ The earlier two phases sought to build popular support and strength, as well as wear down the enemy physically and mentally in preparation for the final decisive blow. After the successful conventional campaign Mao declared the People's Republic of China in 1949 after driving the Nationalists to the island of Taiwan.

⁷⁰ Tse-Tung, *Selected Works*, 138-40.

⁷¹ Thomas M. Huber, ed., *Compound Warfare: That Fatal Knot* (Fort Leavenworth: U.S. Army Command and General Staff College Press, 2002), 1. "Compound warfare is the simultaneous use of a regular or main force and an irregular or guerrilla force against an enemy. In other words, the CW operator increases his military leverage by applying both conventional and unconventional force at the same time."

The communist Chinese Revolution ebbed and flowed over a considerable period. During this time the Chinese Communist Party (CCP), with its alternative political structure, narrative, and leadership used combinations of all means at their disposal to achieve their strategic aim of unifying China under their rule. This struggle meets all of Walt's characteristics for a revolution and is the birth of Mao's three phase protracted war model so often cited and used by revolutionaries. The next section discusses how General Vo Nguyen Giap utilized Mao's basic model as a framework to develop the Vietnamese Revolutions strategy of Dau Tranh.

Giap: Adapting Mao

Mao stressed the requirement to adapt the basic three-phase model to the specific circumstances of each conflict to ensure success. He was adamant that this theory was not a cookie cutter template to implement without such adaptation, yet he stressed the need for a strategy to guide the overall conduct of the revolutionary effort.

It is impossible to predict the concrete situations in the three stages, but certain main trends in the war may be pointed out...The objective course of events will be exceedingly rich and varied, with many twists and turns, and nobody can cast a horoscope for the...war; nevertheless it is necessary for the strategic direction of the war to make a rough sketch of its trends. ...our sketch may not be in full accord with the subsequent facts...,it is still necessary to make it in order to give firm and purposeful strategic direction to the protracted war.⁷²

In the days following the end of World War II, the Vietnamese were also looking to end French colonial rule in the wake of Japanese withdrawal. Ho Chi Minh attempted to seize an opportunity of weak central control of their colonial masters and a high degree of national independence

⁷² Tse-Tung, *Selected Works*, 137.

fervor.⁷³ However, the French were not ready to relinquish control of their colonies. By December of 1946, a full-scale revolution was underway against the French across Vietnam.⁷⁴

The Vietminh under the military leadership of Vo Nguyen Giap engaged in a prolonged struggle for independence. Giap was an avid student of war, and he studied Mao intently to distil lessons applicable to Vietnam. However, he did not assume that Mao's theories and models were directly relevant. Nor did he believe that the standard urban model from the Marxist-Leninist theories fit Vietnam for the same reasons that Mao rejected them. Therefore, Giap studied and developed his amalgamation of ideas into a modified theory of protracted conflict for Vietnam labeled Dau Tranh (struggle).⁷⁵ Giap mimicked Mao's precepts when he commented:

Realizing clearly the enemy's strong and weak points and ours...our party set forth the guiding principle of a long-term Resistance war...Time was needed to mobilise, organize, and foster the forces of the Resistance, to wear out the enemy forces, gradually reverse the balance of forces...and concurrently availing ourselves of the changes in the international situation.

The general law of a long revolutionary war is usually to go through three stages: defensive, equilibrium and offensive. Fundamentally, in the main directions, our Resistance War also followed this general law. Of course, the reality on the battlefields unfolded in a more lively and more complicated manner. Implementing the guiding principle of a long war, after a period of fighting to wear out and check the enemy troops, we carried out a strategic withdrawal from the cities to the countryside in order to preserve our forces and defend our rural bases.⁷⁶

⁷³ Kristin F. Johnson, *Ho Chi Minh: North Vietnamese President*, Essential Library. Essential Lives (Edina, MN.: ABDO Publications, 2012), 36. Interesting note, as Abu Bakr al-Baghdadi would adopt the name of a seventh-century caliph in later years, Nguyen Tat Thanh changed his name to Ho Chi Minh, which roughly translates to he who enlightens in Vietnamese.

⁷⁴ MacDonald, *Giap*, 75-77.

⁷⁵ Cecil B. Currey, *Victory at Any Cost: The Genius of Viet Nam's Gen. Vo Nguyen Giap* (Washington DC: Brassey, 1997), 152-155. Giap studied not only Mao, but Clausewitz, Napoleon, Sun Tzu, and T.E. Lawrence. While he amalgamated many of the ideas and concepts, his basic three-phase framework is that of Mao's protracted war; Douglas Pike, *PAVN: People's Army of Vietnam* (Novato, CA: Presidio Press, 1986), 216-217. "the basic objective of dau tranh strategy is to put armed conflict into the context of political dissidence. Thus, while armed and political dau tranh may designate separate clusters of activities, conceptually they cannot be separated. Dau Tranh is a seamless web."

⁷⁶ Nguyen Giap Vo, *People's War, People's Army: the Viet Cong Insurrection Manual for Underdeveloped Countries* (Praeger Publications in Russian History and World Communism) (New York: Praeger, 1962), 100-101.

Giap adapted Mao's model to the long Indochina war by using the same basic tenets with more flexibility to shift between phases of activities due to the differences in geographical theaters and opponents. A key insight that Giap brought to Maoist warfare was his assessment of the political aspects of his external adversaries. Unlike in China, Vietnam had external adversaries, and Giap astutely understood they were also democracies. He understood that the enemy's domestic public opinion could be a key ally in the overall effort.⁷⁷ Bernard Fall quotes Giap, reminiscent of Mao, in his book, *Street Without Joy: the French Debacle in Indochina*, as stating:

The enemy will pass slowly from the offensive to the defensive. The blitzkrieg will transform itself into a war of long duration. Thus, the enemy will be caught in a dilemma: He has to drag out the war in order to win it and does not possess, on the other hand, the psychological and political means to fight a long-drawn-out war.⁷⁸

Giap expanded Mao's theories to fit the particular context he faced in Vietnam. Once it was clear that the French would not cede control to an independent Vietnam, Giap and the Communists fled to the jungle to begin preparing for their revolution.

In the remote jungle, Giap conducted meticulous preparation activities, and over the course of several years, working diligently in phase one and two operations within Indochina his efforts culminated in a string of victories in 1950 that led to the occupation of the frontier area by the Vietminh. Of these victories in the first major offensives against French troops, Giap stated the "people's war had evolved from guerrilla warfare into conventional warfare." He mistakenly thought the way was open to transition into phase three operations. Launching conventional operations in 1951 brought disastrous results for the Vietminh. A string of successive defeats

⁷⁷ Spencer C. Tucker, *Vietnam* (Lexington, KY: University Press of Kentucky, 1999), 50.

⁷⁸ Bernard B. Fall, *Street Without Joy: The French Debacle in Indochina* (Mechanicsburg, PA: Stackpole Books, 2005), 34.

demonstrated the error in reading the situation and required regression and emphasis of phase one and two operations across the countryside.⁷⁹

The inherent flexibility of the protracted war model allowed Giap to recover from his haste and learn from mistakes made. Reemphasizing phase one and two operations the Vietminh could survive and build their strength and support in the countryside while wearing down the French over the next several years. On 8 May 1954, the French outpost at Dien Bien Phu fell to Giap's forces after a fifty-five-day conventional battle. However, this victory did not spell the end of the struggle for Giap and the Vietminh. The revolution against French colonialism that lasted for eight years had produced a stalemate providing the Communists control of North Vietnam above the seventeenth parallel and the promise of elections to unify the country in 1955.

A series of political developments determined a renewal of the struggle in a new context with the Americans replacing the French and new geographic parameters that were more favorable to the Communist forces. This new phase of the Indochina war would last another ten years. Giap would use the same formula against America and in 1968 would make a similar read on the viability to transition to phase three operations during the Vietnamese Tet holiday. The Communists hoped that a massive military effort across South Vietnam and in the major urban areas would spark a general uprising. These efforts focused on South Vietnam but had a greater effect on the domestic front in the United States. The political consequence of actions resulting in a military defeat would signal the decline of American involvement in Vietnam.⁸⁰

Overall operations for Giap and the Communists followed the familiar pattern of the first two phases of protracted war until the Americans left their South Vietnamese ally to fend for themselves against a phase three conventional onslaught in 1975. Giap's ability to reinvent the

⁷⁹ MacDonald, *Giap*, 98-102; Fall, *Street Without Joy*, 33-40; Robert Taber, *The War of the Flea (How Guerrilla Fighters Could Win the World!)* (London: The Citadel Press, 1970), 66-67.

⁸⁰ Macdonald, *Giap*, 262, 268-269.

protracted war methods within the context and means available eventually allowed an overwhelmingly successful transition to phase three operations against South Vietnam resulting in a unified Vietnam under Communist rule. Maoist revolutionary war theory proved successful once again.

Walt's revolutionary characteristics are evident throughout this conflict as well. The Vietnamese Communists exercised a withering military and political campaign against internal and external enemies during their revolution. Eventually, these activities weakened the resolve of the governments of France, the United States, and South Vietnam in their abilities to apply coercive power allowing greater freedom for Giap. As the first televised conflict, the Vietnam War is associated with many iconic images and prevailing symbols. The North Vietnamese successfully co-opted mass media coverage to support their political propaganda campaign. Major news networks and distribution nodes aided by displaying daily images of burning monks, combat footage, and protests continually. These actions eventually culminated in Giap's ability to escalate the violence into Mao's third phase of overwhelming conventional measures in April of 1975 toppling the South Vietnamese government and ending the war.

Muhammad: The First Islamic Revolution

Maoist-like revolutions predate Mao's writings. The following analysis of Muhammad's revolution against Mecca and the establishment of the first caliphate provide a parallel and historical context to this study. Jihadist goals are the same now as they were for Muhammad in the seventh century, to establish an empire for Islam. It was through violent revolution and expansion that Muhammad established the first Caliphate using unrestricted warfare tactics such as propaganda, terror, and insurgency.

Noted author Stathis Kalyvas has commented on the Islamic State saying that the agenda of a revolutionary group is not to just gain power but "self-consciously to transform society in a

deep and radical way, by profoundly rearranging social and political relations.”⁸¹ Richard Gabriel, in his book *Muhammad: Islam’s First Great General* comments that Muhammad was a revolutionary who led the first recognizable insurgency transforming societies in the region in a truly deep and remarkable and lasting manner. In Gabriel’s opinion, the jihadist effectively uses Muslim common knowledge of these actions to justify their similar use of violence and tactics.⁸² Clearly, Muhammad executed a recognizable revolution against Mecca in the seventh century to establish Islam and the first Caliphate upon his death.

Muhammad was born into the Meccan Quraysh tribe in an Arabian culture exhibiting lenient control and trade without a strong centralized government. Although the great Byzantine and Persian Empires bracketed Arabia to the east and west, the peninsula itself was mostly tribal and organized around trading posts located near oases scattered along caravan routes. Due to previous conflicts, the two great empires had lost much influence in Arabia resulting in a reversion of many tribes to traditional idol worship.

Mecca was home to the Ka’bah, a revered religious shrine reportedly built by Abraham and his son Ishmael using a stone cast down at Adam’s feet from heaven within Mecca.⁸³ This shrine was of great importance to not only the monotheistic religions of Christianity and Judaism but also the pagan religions. In the absence of imperial influence, the Quraysh established control of food, water, and lodging within Mecca providing them substantial influence due to the number

⁸¹ Stathis Kalyvas, “Is ISIS a Revolutionary Group and if Yes, What are the implications?” *Perspectives on Terrorism* 9, no. 4 (2015): 43.

⁸² Richard A. Gabriel, *Muhammad: Islam’s First Great General (Campaigns and Commanders Series)* (Norman, OK: University of Oklahoma Press, 2011), xx.

⁸³ Russ Rodgers, *Fundamentals of Islamic Asymmetric Warfare: A Documentary Analysis of the Principles of Muhammad* (Lewiston, NY: Edwin Mellen Press, 2008), 7, 12, 360.

of pilgrims traveling to the Ka'bah for the hajj or omra.⁸⁴ The weak tribal council of Mecca combined with the Qurayshi positional influence often led to contentious situations and an inability to enforce council decisions.

The lack of central authority coupled with tensions between tribes and among social classes within Mecca produced conditions that Muhammad could exploit, which is in keeping with Walt's weak central authority characteristic for revolutions. The social structure of Mecca generated much of the tension that sometimes boiled over into open conflict. The sheiks were the tribal leaders and the propertied class, holding land and significant influence but little wealth. The growing importance of Mecca as a trade center empowered an emerging merchant class that began to challenge the sheiks and tribal customs. These merchants began to separate themselves from the tribal system causing friction. Caught in between these two classes were the peasants or poor servants that held neither money nor land.⁸⁵

Sometime around 594 AD, Muhammad married a wealthy widow and became a successful businessman dealing with caravans and trade. His new status permitted him the freedom to spend time in meditation in the mountains outside of Mecca. Soon he began receiving revelations from the Angel Gabriel. Muhammad initially maintained secrecy until he established sufficient converts and protection to proclaim himself as the last Prophet of Allah.⁸⁶ He began openly preaching to travelers in the bazaars and caravan camps garnering significant support in Mecca and abroad. Many powerful tribal leaders and families of Islamic converts in Mecca

⁸⁴ Gabriel, *Muhammad*, 148. "Pagan (and later Muslim) pilgrimages to Mecca were of two types: the *hajj*, or Greater Pilgrimage, which could only be made on a specified day of the year, and the *omra*, or Lesser Pilgrimage, which could be carried out at any time."; Rodgers, *Fundamentals of Islamic Asymmetric Warfare*, 358.

⁸⁵ Russ Rodgers, *The Generalship of Muhammad: Battles and Campaigns of the Prophet of Allah* (Gainesville FL: University Press of Florida, 2012), 26-32.

⁸⁶ D. S. (David Samuel), Margoliouth, *Mohammed and the Rise of Islam* (New York: Putnam, 1905), 152.

viewed his growing power and religious position as a threat. Others believed his power as a prophet could transcend rivalries and bring disparate groups together under one belief system thereby a vehicle to gain greater power.⁸⁷

Author, Russ Rodgers points out in *The Generalship of Muhammad*, that in the early days of his ministry in Mecca many thought, “Muhammad and his small band of followers were the vanguards of a new revolution.”⁸⁸ The loose central governance in Mecca at that time resembled a representative republic, showing tolerance to other ideas bred by polytheism, initially permitting Muhammad great freedom. Muhammad was attempting to change all of this with the monolithic social system of Islam, which would strip many of their influence and power.

Converts to Islam would willingly surrender their way of life to its teachings and his authority. This submission transcended the loyalties of the family and tribe and gave birth to the umma.⁸⁹ Muhammad as the Prophet of Allah, in effect, would become a trans-tribal sheik wielding great power and influence over the umma as it grew. In consonance with Walt’s third characteristic of revolutions, he set out to change the political discourse and social norms within the Arabian tribal society of his time with the new religious ideology of Islam.

⁸⁷ Rodgers, *The Generalship of Muhammad*, 34-35.

⁸⁸ Ibid., 39.

⁸⁹ Rodgers, *The Generalship of Muhammad*, 39-42; Rodgers, *Fundamentals of Islamic Asymmetric Warfare*, 12.

Eventually, Muhammad's activities began to disrupt and alarm the leading clans and tribes in Mecca. Fearing his growing influence and power, many of the tribes and clans in Mecca began campaigns of persecution against the Muslims. Attempts to undermine or co-opt Muhammad's position and address his movement involved boycotts and even offering him the kingship of Mecca, which he refused. The ten years Muhammad grew Islam, and the Muslim umma within Mecca displays what Walt refers to in his second characteristic of revolutions. The steady increase in political activities associated with his sermons, preaching, and conversion efforts and the frictions those activities caused within Meccan society brought tension to the brink of violence.

During the early growth of Islam in Mecca Muhammad espoused a passive and tolerant version of the religion. This phase represents a Maoist phase one or strategic defense. Eventually, the tensions forced the Muslims to migrate from Mecca to Medina where they sought asylum in the company of others that had converted to Islam. We can correlate the flight of the Muslims, the Hijrah, to Medina with the Communist Long March in China to escape destruction. It was during this period in Medina that the transition to phase two activities is evident. Muhammad began to preach revelations condoning militant activities against the oppressors of Islam.⁹⁰ The Muslims had found a support base away from persecution that was developed and strengthened as a base of operations. During this time, the Muslims built a Mosque to serve as the sociopolitical center of operations, and they began to build a guerrilla force.

His ideological base solidified, and with continued revelations permitting him to adjust the direction and guidance of his followers, Muhammad continued to generate greater support from more of the population. Once his guerrilla band was sufficiently manned and equipped, Muhammad began to train and conduct operations against caravans to and from Mecca. Similar to

⁹⁰ Rodgers, *The Generalship of Muhammad*, 49.

Mao in Northern China, it was in Medina that Muhammad consolidated power, trained his growing army, and where phase one strategic defensive operations transitioned to phase two.

In this revolutionary struggle, by Maoist principles, the relationship with the masses was a critical component. Muhammad mobilized the Muslims into his vanguard similar to Mao with the peasant classes. His intent was to unify Muslims into an independent tribal group prepared to wage war against all opposing them.⁹¹ This group of Muslims transcended their historical sociopolitical ties to family and tribe to become the umma. In Medina, the basis for the sociopolitical order of Islam established itself with the goal of expansion until Islamic law prevailed over the entire world. Continued conversions and conquests of various tribes increased the size of the umma and those under subjugation to the Muslims. Transition to offensive guerrilla operations while in Medina introduced Walts' fifth characteristic of revolutions into Muhammad's struggle against Mecca, violence.

He began the guerrilla campaign in 622 AD through raids on the various caravans that would travel to Mecca to conduct trading activities. Richard A. Gabriel characterizes Muhammad as a religious guerrilla and revolutionary that implemented Giap's doctrine as reflected in his book *People's War, People's Army* to achieve his political and religious goals.⁹² It was through effective implementation of the precepts of insurgency and guerilla warfare that Muhammad eventually raised a disciplined and experienced army strong enough to challenge Mecca directly.

Over the course of the next seven years, Muhammad used "tactics and techniques such as information operations, assassinations, disinformation, subterfuge, and at last direct action" to transition to phase three operations and marched on Mecca in 629 AD. At the head of 10,000 men, Muhammad encircled the city and with minimal resistance accepted their surrender. Thus

⁹¹ Rodgers, *The Generalship of Muhammad*, 58.

⁹² Gabriel, *Muhammad*, xx, xxiii, 75, 219.

concluding a textbook short and decisive phase three conventional offensive operation to establish Mecca as the heart of a new Islamic empire.⁹³

The expansion of Islam continued until Muhammad's death in 632 AD. After his death, leaders within the umma selected Abu Bakr as the first Caliph and leader of the Umma. Abu Bakr then quickly crushed several rebellions as the umma fractured after Muhammad's passing. Consolidating his power and regaining the loyalty of the umma Abu Bakr established the first Caliphate.⁹⁴

The ensuing history of Islam and the Caliphate is tumultuous and rife with conflict and bloodshed. However, it is against this historical background that the strategists of jihad have taken valuable lessons. The birth of active jihadist organizations like the Muslim Brotherhood after the dissolution of the Ottoman Empire, the last Caliphate, in 1924 through the creation of Al Qaeda, the first transnational jihadist coordination group, and now ISIS trace their evolution to these roots. Their interpretation of the ideology of Islam and the lessons of Muhammad combine with the vast literature available on revolutionary and guerrilla movements to provide a wealth of strategic, operational, and tactical knowledge they can exploit.

Jihadist Operational Art

Dr. James Schneider has postulated, "the hallmark of operational art is the integration of temporally and spatially distributed operations into one coherent whole."⁹⁵ In the preceding case

⁹³ Rodgers, *Fundamentals of Islamic Asymmetric Warfare*, 16-18.

⁹⁴ Walid Phares, *The Coming Revolution: Struggle for Freedom in the Middle East* (New York: Threshold Editions, 2010), 9-10. "In Arabic, the word for successor is Khalifa, or caliph. The institution of the Caliph is al Khalifah or Caliphate. It has two dimensions; the first is the legal and theological structure of the umma's top spiritual office, which is comparable to the 'papacy', 'monarchy', or 'presidency,' the second is the entire land and resources covered by the authority of the Caliph, as an 'empire.' The geopolitical sense of the Caliphate is 'empire.'"

⁹⁵ James J. Schneider, "The Loose Marble - and the Origins of Operational Art," *Parameters*, March 1989, 87.

studies Mao, Giap, and Muhammad were the operational artists orchestrating actions in time and space towards their ultimate strategic objectives. As illustrated, the Jihadists are using a Maoist operational approach to achieve their strategic goals. The jihadist's original strategy, under the Al Qaeda vision, was to seek unity of the Muslim community under an umbrella of a unified umma similar to that espoused by Muhammad at the birth of Islam.⁹⁶ Bin Laden and the Al Qaeda leaders understood Mao's emphasis on the strategic defense phase to shape conditions before transitioning to the other phases.

However, ISIS exhibits impatience for the protracted nature of Al Qaeda's more prescriptive translation of Mao's model. Sensing opportunity after the withdrawal of the United States from Iraq, the Arab Spring phenomenon, and unrest in both Libya and Syria, they accelerated their transition to a strategic offensive phase similar to instances called out in the case studies.⁹⁷ Differences in interpretation of implementation are key contributors to internal divisiveness currently experienced among jihadist groups. The initial solidarity fostered by the success of Al Qaeda is fracturing. Currently, ISIS and Al Qaeda represent the two most visible interpretations of how terror and insurgent campaigns are being orchestrated to achieve the strategic goal of restoring the Islamic Caliphate as a precursor to the further expansion of Islam.⁹⁸

⁹⁶ David Kilcullen, "Countering Global Insurgency," *Journal of Strategic Studies* 28, no. 4 (2005): 597-617.

⁹⁷ Walt, *Revolution and War*, 38-39. Infected with this impatience they have pushed into conventional operations much as the Chinese Communists did in 1927 and Giap in 1950-51 and 1968. Inference can be made of a focoist nature to ISIS actions similar to Fidel Castro and Che Guevara's success in accelerating Cuban revolutionary victory against a much weakened and corrupt Batista regime giving credence to Mao's thought that, "a single spark can ignite a prairie fire." Violent acts performed by the core revolutionaries may spark the rapid spread of a successful revolution and build indigenous support afterwards instead of before as with a traditional Maoist approach.

⁹⁸ ADRP 3-0, *Operations*, 2-1. Orchestration of engagements and battles into campaigns represents the practice of operational art. Current doctrine defines operational Art as "the cognitive approach by commanders and staffs – supported by their skill, knowledge, experience, creativity, and judgment – to develop strategies, campaigns, and operations to organize and employ military forces by integrating ends, ways, and means."

What is to be done?

Vladimir Lenin posed this question in 1922 when laying the foundation for the revolutionary party that would eventually take control of Russia and become the Soviet Union. George Kennan also clearly thought about this very same question when, at the request of the Truman administration, he presented his analysis of the Soviet Union in his now famous long telegram from Moscow in 1946. He followed this telegram with an equally famous article on the same subject in Foreign Affairs in 1947.⁹⁹ His thoughts coalesced into what would become the containment strategy adopted by the United States during the Cold War against the Soviet Union. Kennan's formulation of the concept of a long-term response to the challenges posed by the particular brand of Soviet communist ideology was informed by his deep understanding of Russian history, culture, and worldview of the time, and remains compelling today.

Regarding the Soviet version of communist ideology, Kennan commented, "...truth is not a constant but is actually created, for all intents and purposes, by the Soviet leaders themselves... It is nothing absolute and immutable."¹⁰⁰ Therefore, he viewed ideology as a means to further aims and policies for those using it to legitimize their positions of power. As with Mao, Giap, and Muhammad, Stalin used the ideology of communism as a means to further Soviet policy aims.¹⁰¹

In a similar manner to the Soviets' use of ideology as a tool for legitimization, the jihadists use Islam through the process of jurisprudence. Many historical examples of interpreting Islam to benefit nationalistic regimes in support of their policies have occurred. One example was Abdel Nasser's use of the Islamic school at Al Azar, though subsidization efforts, to rule favorably on

⁹⁹ Thomas H. Etzold and John Lewis Gaddis, *Containment: Documents on American Policy and Strategy 1945-1950* (New York: Columbia University Press, 1978), 50-63, 84-90.

¹⁰⁰ John Lewis Gaddis, *Strategies of Containment: A Critical Appraisal of American National Security Policy During the Cold War* (New York: Oxford University Press, 2005), 34.

¹⁰¹ Gaddis, *Strategies of Containment*, 34.

his regime's policies to gain acceptance for them by the Umma within Egypt. Current Jihadists also use unofficial ulama rulings and fatwas to interpret Islam and pull verses from the Quran to justify their positions.¹⁰²

Kennan understood that it is virtually impossible to defeat an ideology with direct action. More realistic goals seek to isolate and contain it while inoculating areas vulnerable to its influences.¹⁰³ As indicated at the beginning of this paper on ideology, the brand of Chinese communism evolved into an integral part of the transnational fabric, while the Soviet version imploded. These events were shaped through indirect, not direct confrontation in the global arena.

It was the careful indirect peripheral actions that shaped each in some way over many years. Kennan called for the “long-term, patient but firm and vigilant containment of expansive Russian tendencies.”¹⁰⁴ He saw the primary goal was to contain the physical manifestation of communism, with force if necessary, but to create a more resilient world resistant to the ideology itself. Interestingly, he warned about the application of military means against a primarily ideological or political problem serving as a catalyst to coalesce opposition to the external threat. Gaddis states that Kennan felt “direct military intervention to prevent communist takeover would only propel the U.S. into a series of civil wars from which it would be difficult to extricate itself.”¹⁰⁵

¹⁰² Esposito, *Islam*, 167. “Nasser used religious symbols, language, leaders, and rhetoric to legitimate and win support for his Arab socialist ideology and policies. State control of Al-Azhar University and a state sponsored Supreme Council of Islamic Affairs were used to legitimate and promote the Islamic character of Arab socialism. Official announcements or legal decrees (fatwas) were obtained from Islamic scholars at Al-Azhar University, which had been nationalized in 1961, to establish the compatibility of Arab socialism and Islam.

¹⁰³ Gaddis, *Strategies of Containment*, 35.

¹⁰⁴ Ibid., 4.

¹⁰⁵ Ibid., 44.

Ultimately, to counter unrest and shape the world order into one more favorable to the interests of the United States Kennan distilled his analysis into three broad steps by 1948:

1. Restoration of a balance of power, through encouragement and confidence in nations threatened by Soviet expansionism
2. Reduction, by exploiting tensions between Moscow and the international communist movement
3. Modification, over time, of the Soviet concept of international relations, with a view to bringing about a negotiated settlement of differences.¹⁰⁶

These three steps are illustrative of a nuanced operational approach to address the Soviet communist threat over time.

The first point emphasizes building strength through the support of nations to allow them to resist invasive ideologies on their own naturally. Increased regional and national strength reduces the need for the United States to intervene continually.¹⁰⁷ Kennan envisioned an emergence over the long term of stable and independent concentrations of authority to provide a natural balance of power to ensure world order, not superpower hegemony.¹⁰⁸ The global order was maintained through the practical support of stabilizing regimes during the Cold War, even though they were often morally repugnant. More recent shortsighted moral non-intervention policies have assisted in the fatal weakening of regimes during the Arab Spring phenomenon.

The second point recognizes the internal seams and fissures extant between the various interpretations of communism. Kennan sought to limit the Soviet ability to project influence to

¹⁰⁶ Gaddis, *Strategies of Containment*, 36-37.

¹⁰⁷ Ibid., 37-39. “Communism was not the disease; it was only a complication. ‘We will not cure the disease by treating the complication alone.’” Kennan saw massive assistance to nations psychologically susceptible to communist advances as a critical component of United States policy. The most visible component of this approach was the Marshall Plan. This economic aid was undertaken to strengthen European cohesion and vitality to resist communism by building strength and co-dependence. Similarly addressing areas susceptible to the spread of jihadist ideological rhetoric must be a priority.

¹⁰⁸ Ibid., 41-42.

other communist states and regions through the recognition and exploitation of tensions. He noted that the Russians had a “chronic inability to tolerate diversity.”¹⁰⁹ This is another concept applicable to dealings with jihadist groups and the greater Islamic community, as there is already naturally occurring dissension among the jihadist. We should actively seek any schisms or opportunities to reduce their ability to influence the greater ideology of Islam.

Embodied in the third point is Kennan’s view that the “...hostility toward the West to be rooted in forces deep within Russian society, he did not expect ‘tendencies toward accommodation to emerge until a fundamental change had taken place in the Soviet concept of international relations.’¹¹⁰ In this, Kennan thought it might be possible to bring about a change in Soviet desires to restructure the outside world in a manner consistent with their vision short of war. He believed that war was too costly and posed uncertain and equally challenging futures to contemplate.¹¹¹

On this point, ideological challenges may present an enormous hurdle with respect to the current jihadist threat. However, there is hope in seeking continuous engagement with the greater Islamic community and attempts to turn existing jihadists away from their apocalyptic views. Continual engagement and diplomacy underpin the ability to recognize where allies may reside and where threats present themselves. Building a coalition within Islam to assist the evolution of their religion into a more open and diverse version as was seen during the Abbasid Caliphate

¹⁰⁹ Gaddis, *Strategies of Containment*, 42.

¹¹⁰ Ibid., 48.

¹¹¹ Ibid., 49. “I would rather wait thirty years for a defeat of the Kremlin brought about by the tortuous and exasperatingly slow devices of diplomacy than to see us submit to the test of arms a difference so little susceptible to any clear and happy settlement by those means.”

period benefits the United States and world interests in the long term, but it requires patience and understanding to avoid missteps.¹¹²

Although the threat and global environment today are different from those confronting Kennan after World War II similarities do exist, and a flexible adaptation of the containment concept is a viable starting position for a long-term solution. Kennan's pattern of inquiry and analysis is the critical component we should seek to emulate. Containment in its original form addressed national security while avoiding global commitments that were unsustainable. As John Lewis Gaddis comments, "what was required was not to remake the world in the image of the United States, but simply to preserve its diversity against attempts to remake it in the image of others."¹¹³ Clear identification and prioritization of vital national interests are critical to the successful, efficient, and effective use of national power.

Containment revisited

The enmity aroused by the acts perpetrated on September 11th provided the impulse to militarize United States foreign policy. America went in search of vengeance. Emotions, as well as enmity, fueled a desire to inflict moral justice to those who would commit such heinous acts. The rapid escalation of overt conventional military operations plunged the nation into a conflict that remains unresolved and yet mislabeled. John Quincy Adams, in an 1821 address on the Fourth of July, warned about moral convictions tempting the United States to pursue military,

¹¹² Esposito, *Islam*, 52-57. "The early centuries of Abbasid rule were marked by an unparalleled splendor and economic prosperity whose magnificence came to be immortalized in the Arabian Nights. In a departure from the past, Abbasid success was based not on conquest, but on trade, commerce, industry, and agriculture. The enormous wealth of the caliphs enabled them to become great patrons of art and culture, and thus create the more significant and lasting legacy of the Abbasid period, Islamic civilization."

¹¹³ Gaddis, *Strategies of Containment*, 56.

foreign policy. During his remarks, he cautioned, “...that America ought not go abroad in search of monsters to destroy.”¹¹⁴

Identification of what are truly existential threats to our national security must be grounded in pragmatism. Critically informed analysis of the challenges and limitations to our capabilities must inform any decisions on what actions to take against the threats identified. George Kennan intrinsically understood this. As powerful, as the United States is we are not omnipotent and can succumb to culmination then exhaustion. Maintaining a position of strategic advantage over the long haul requires us to be cognizant of the realities of our capability limitations and risks of overextension. Our overextension signals a strategic stalemate and therefore an opportunity for adversaries.

Nevertheless, we do face threats intent on challenging our way of life and very existence that must be addressed. In many cases, a vast majority of cultures, regions, and nations in the global community face the same threats. An example of this magnitude is the jihadists who are currently executing a transnational effort intent on the reinstitution of a global Caliphate and violent expansion of Islam. They seek to spark an Islamic revolution to reinvigorate the expansion of Islam in the manner of Muhammad and his successors, with the ultimate goal of enveloping the world. However, just as we miscast Soviet Communism as a monolithic ideological threat on a revolutionary course to change the world, we risk doing the same to not only the jihadist movement but Islam as well. Nevertheless, this conflict is existential from the jihadists’ point of view, and we must certainly give credence to that perspective.

This paper began with a quote from Mawlana Abdul a’la Maududi, a prolific Islamic writer, and influential figure in jihadist evolutionary thought. To reiterate the extent of the threat

¹¹⁴ Ralph Raico, *Great Wars and Great Leaders: A Libertarian Rebuttal* (Auburn, AL: Ludwig von Mises Institute, 2015), 32.

they pose, it is fitting to submit for review another quote from this author to reaffirm the thesis of this paper regarding the revolutionary nature and intent of jihadists:

Islam wishes to destroy all States and Governments anywhere on the face of the earth which are opposed to the ideology and programme of Islam regardless of the country or the Nation which rules it. The purpose of Islam is to set up a State on the basis of its own ideology and programme, regardless of which Nation assumes the role of the standard bearer of Islam or the rule of which nation is undermined in the process of the establishment of an ideological Islamic State.¹¹⁵

The fervor and passion evidenced in this passage are rife throughout the voluminous writings of jihadist authors prompting the need to take action now.

Mark Twain is often given credit for saying, “The past may not repeat itself, but it sure does rhyme.”¹¹⁶ It is for this reason that we must study the past to provide clues to the future. Dean Acheson, writing on the Communist threat after World War II, recognized the previous threat of Islamic expansionism when he remarked in his memoirs, “The threat to Western Europe seemed to me singularly like that which Islam had posed centuries before, with its combination of ideological zeal and fighting power.”¹¹⁷ It appears the temporal roles have shifted once again prompting a study of the past to provide clues to the future.

A crucial reason for historical study is to extract lessons from the past regarding their applications to the present so we may shape the future. However, all too often we face the challenge of recognizing threats appropriately, discerning what past lessons may apply and when to implement them. Merely acknowledging a revolution using a Maoist operational approach is not enough. As the noted counterinsurgency expert David Galula stated, “The one who directs a

¹¹⁵ Mawlana Abdul a’la Maududi as quoted in David Aaron, *In Their Own Words: Voices of Jihad--compilation and Commentary*, 57.

¹¹⁶ Robert R. Owens, *The Constitution Failed: Dispatches from the History of the Future* (Maitland, FL: Xulon Press, 2010), 96.

¹¹⁷ Dean Acheson, *Present at the Creation: My Years in the State Department* (New York: W. W. Norton & Company, 1987), 376.

war against a revolutionary movement will not find in Mao and other revolutionary theorists the answers to his problems.”¹¹⁸ We need to dig deeper and examine those factors relevant to neutralizing that threat. Similar to the Cold War, this ideological struggle requires more than military means to address it.

The approach taken by the United States to counter communism after the cold war was based on the recommendations of George Kennan. An essential piece in the success of Kennan’s approach was the necessity to identify and study the adversary holistically and accurately. The jihadist threat is not merely the specter of monolithic Islamism. It is a diverse and complicated political entity based on an interpretation of Islamic ideology wielded by actors in various regions of the globe for disparate local reasons. There is a strategic front story to the jihadists that subverts all of their activities toward the dominance of Islam and recreation of the Caliphate. There are also as many back stories and divisions within their seemingly monolithic movement to be discovered and exploited.

To be clear, jihadists’ interpretations of Islam are not a new phenomenon. These views trace their origins back to the seventh century, to Muhammad and the birth of the religion. The danger inherent in subverted ideologies is their capacity to inspire and mobilize masses of disaffected people into action. Jihadists explicitly seek to affect the Muslim peoples of repressive Middle Eastern regimes in this way, the more disaffected the populations, the more effectively exploited. Addressing these susceptible populations and the reasons for their disaffection by the global community will be much more effective and less costly in the long term.

As Wendell Phillips correctly declared, “revolutions are not made; they come.”¹¹⁹ Small cadres, often termed vanguards, seek to harness and exploit the inherent capability of millions of

¹¹⁸ David Galula, *Counterinsurgency Warfare: Theory and Practice (PSI Classics of the Counterinsurgency Era)* (Westport, CT: Praeger Security International, 2006), xiii.

¹¹⁹ Theda Skocpol, *States and Social Revolutions: A Comparative Analysis of France, Russia, and China* (Cambridge: Cambridge University Press, 1979), 17.

people toward their ideological, political ends. The vanguard party presents an ideological rallying point to amplify the grievances and aggregate the power of these populations. This mobilized population then provides the support and resources to wrest control from those in power. This ideological aggregation and channeling of the power of a population is the efficacy of a Maoist approach.

The similarities to ideological struggles and attempts to mobilize populations around competing ideas during the Cold War are well recognized. Michael Watts noted that the jihadists, “...tactics and strategies borrow heavily from the Marxist canon: vanguardism, anti-imperialism, revolutionary terror, and popular justice.”¹²⁰ Similarly, Stephen Biddle identifies the linkage of ideas and physical force and the similarity to the Cold War in a 2002 Strategic Studies Institute report titled *Defeating Terrorism: Strategic Issue Analyses*:

...this war can be won, not merely contained. But this will require war aims focused on our enemies' ideology, not their tactics. And this, in turn, will demand an especially close interconnection between a war of military violence and an inseparable war of ideas. In fact, the best lens for understanding this new war and its termination requirements may be our last great military-ideological struggle: the Cold War.¹²¹

Once we have studied the threat to look intrinsically at the core ideology, its vulnerabilities, capabilities, strengths, and other variables required to develop an informed understanding, we need to develop a counter approach. This counter-strategy must be sustainable and comprehensive. Further, it should be conceived as a shared vision among a coalition or alliance of transnational partner involving all elements of national power. Acting against a transnational threat requires transnational coherence in action with global partners to be successful.

¹²⁰ 10. Michael Watts, “Revolutionary Islam,” in *Violent Geographies*, ed. Derek Gregory and Allan Pred, 186.

¹²¹ John R. Martin, ed., *Defeating Terrorism: Strategic Issue Analyses* (Carlisle, PA.: Strategic Studies Institute, US Army War College, 2002), 7.

Regardless of the ideological core of the adversary, it continues to produce insurgencies, terrorism, criminal activities, and more recently functional semi-state. Therefore, a physical containment aspect across all domains and elements of national power remain necessary. Military and law enforcement activities are an integral component of this strategy just as they were during the Cold War. However, judicious use of force coupled with prudent transnational efforts along all other fronts will garner maximum effect.

We must seek to build transnational partnerships and regional alliances to inoculate nations, cultures, and regions to jihadists' ideological interpretations. This requires a pragmatic and unapologetic assessment of those who sponsor and underwrite them in the global community. Targeting governments, groups, and individuals providing much-needed sustainment to jihadists while increasing any and all efforts to make the sea these fish swim in uninhabitable should be a priority.

We must also realize that we cannot contain or defeat an ideology. Countering or co-opting that unfavorable ideology with a more evolutionary competing interpretation from within Islam itself is necessary. While the jihadists are, open to modern political and, military technologies, ideas, and practices, their narrative is rooted in Islamic history and the traditions of Muhammad.¹²² They strive to anchor their message in the infallible history of the religion that is the bedrock of all Islamic faith globally.

Our development of an understanding of Islam, specific Muslim cultures worldwide, the jihadists and the internal conflicts within and among them will assist in developing a strategy based on thoughtful analysis informed by culture, history, and interpretation. Assisting moderate evolutionary minded Muslims in the development and propagation of a counter narrative will address the challenge Rohan Gunaratna warned about when he stated, "In the absence of a

¹²² Esposito, *Islam*, 181-182.

powerfully articulated counter ideology, Al Qaeda can come to represent the truth for some Muslims.”¹²³ Only by addressing the root cause, the ideological interpretation, over the long term and not merely the symptoms can we hope to succeed.

The concept of containment set forth by George Kennan was nuanced and complex in its understanding and intent. Mere physical containment is not enough to address the full depth and breadth of the threat faced. Understanding cultural and ideological aspects permits a greater appreciation for the need to allow the threat to run its course and implode under its own weight while minimizing its physical impact on the greater global community in the process.¹²⁴ The adversary must be starved of the resources it requires to survive to set conditions for success, similar to what occurred during the Cold War.

It remains to be seen how long the weakness in Syria, Libya, and other nations in the region will allow ISIS to survive. However, as history indicates, conventional defeat and eradication of the latest version of the Caliphate will merely cause a reversion to earlier phases. Subsequently, the most likely action would be re-affiliation with Al Qaeda as the preeminent jihadist group. Jihadist ideology will not be destroyed by defeating the cells, terrorists, bombers, or armies that choose to fight because of it. Applications of counter terrorism, counter insurgency, or military force alone merely plays into the jihadist strategy of exhaustion.

Instead, we must heed Kennan in his perception of the limitations of the United States and our allies. As Richard Nixon reminds us, “no country has enough power to make an open-

¹²³ Rohan Gunaratna, *Inside Al Qaeda: Global Network of Terror* (New York: Berkley Trade, 2003), 19.

¹²⁴ George F. Kennan, *American Diplomacy*, 60th-anniversary ed. (Chicago: University Of Chicago Press, 2012), 108. “...in war there can be only the achievement or non-achievement of your objectives. But where your objectives are moral and ideological ones and run to changing the attitudes and traditions of an entire people or the personality of a regime, then victory is probably something not to be achieved entirely by military means or indeed any short space of time at all.”

ended commitment to promoting its ideas around the world by any and all means necessary.”¹²⁵

These continued increases in security and external operations in the Middle East are draining western nation’s resources while conditioning populations to the jihadist’s narratives.

Closing Thoughts

This paper has argued that the greater jihadist threat is fomenting a global Islamic revolution through all means at their disposal. Furthermore, a modified and informed containment doctrine can succeed in quelling the jihadists’ expansionist revolutionary aspirations. Review of George Kennan’s complex thoughts on containment as they pertained to Soviet communism mitigated by the limitations of the United States created a flexible long-term policy that continued to evolve as necessary until it succeeded. Jihadists are a symptom of the underlying challenges of an ideological interpretation within the greater global system. While we must treat that symptom (through containment), analysis and application of remedies (diplomacy, economic aid programs et al.) to regions at risk inoculates the system from further spread as the disease runs its course.

In closing, we need to continually assess and evaluate actions and reactions in this conflict in an informed way to allow the Jihadists to affect their own destruction. The jihadists have not yet effectively coalesced or managed to spark the greater revolution they seek. They remain fragmented, choosing divergent activities in separate geographic regions within the framework of a Maoist operational approach. Ostensibly, they all aim to foment a greater revolution within Islam using the tactics of unrestricted warfare to achieve the same strategic goal, an Islamic Caliphate. Pragmatic efforts to counter the jihadist’s revolutionary movement while we still maintain global influence affording us the ability to engage transnational partners

¹²⁵ Richard Nixon, *In the Arena: A Memoir of Victory, Defeat, and Renewal* (New York: Simon & Schuster, 1990), 338-339.

should strive to emulate George Kennan's honest and brutal analysis of both the threat and ourselves.

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